

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: Carlton James Retirement Fund

Member Name: Beverley Barnett

Please accept this as my written request to take benefits from the above scheme and confirmation of information in respect of this Benefit Crystallisation Event:

Required Benefits

- ~~1. I wish to draw all of my fund in Tax Free Cash and Income~~
- ~~2. I wish to vest segments and take as Tax Free Cash and Income~~
3. I wish to vest sufficient funds to provide a Tax Free Cash amount of £1,500.00
- ~~4. I wish to vest sufficient funds to provide an annual Income amount of £~~

Other (please detail)

Will this be your first Benefit Crystallisation Event occurring on or after 06 April 2006 (under any Registered Pension Scheme)?

Yes

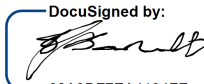
No ☒

If 'No', what was the date of your first Benefit Crystallisation Event occurring on or after 06 April 2006

17/12/2021

What is the percentage of the SLA used up under those earlier Benefit Crystallisation Events that occurred under any other Registered Pension Scheme you are (or were) a member of, as recorded on your latest scheme statement(s). Copy statement(s) **MUST** be attached.

Name of Registered Pension Scheme
% SLA

Signed:  62A9DF7EA4194FF...

Date: 15/7/2022